



## Wholesale Insurance Broker Drops Lotus Notes for a Hosted Microsoft Messaging Solution

### Overview

**Country or Region:** United States

**Industry:** Insurance

### Customer Profile

94-year old Swett & Crawford is one of the preeminent wholesale insurance brokers in the United States. Based in Atlanta, Swett & Crawford has more than 35 regional offices and 900 employees.

### Business Situation

Swett & Crawford had been using IBM Lotus Notes for messaging for years. But it was proving hard to find qualified Notes support and the Notes e-mail repository was approaching four terabytes in size.

### Solution

Swett & Crawford decided to overcome its personnel and technical challenges simultaneously by outsourcing its e-mail function to USA.NET and its hosted Microsoft Exchange Server offering.

### Benefits

- Eliminated need to find and hire Lotus Notes experts
- Gained access to round-the-clock support services from USA.NET
- Gained increased application reliability and accessibility
- Gained greater ability to manage the e-mail application autonomously

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*Chris Mitchell, CIO, The Swett & Crawford Group*

Insurance wholesale broker Swett & Crawford sends and receives more than one million e-mail messages each month, and for its 900+ users the availability and reliability of an e-mail solution is critical to business. Swett & Crawford was still relying on the IBM Lotus Notes-based e-mail infrastructure that was using when it divested from its parent company two years earlier, and it was increasingly difficult to find resources to maintain that infrastructure. Swett & Crawford decided not only to migrate off the Notes platform, but it also decided to seek an external partner who could maintain the entire messaging infrastructure. Its choice? USA.NET and its hosted messaging solution based on Microsoft Exchange Server. The decision frees the Swett & Crawford IT department to add value elsewhere within the company while enabling easy access to a mail system that is more reliable and more flexible.



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## Situation

When Swett & Crawford was divested from its parent company as an independent wholesale insurance brokerage business in 2005, the new company's one-person IT department had much to do and little time in which to do it. The 700 employees at the newly independent Swett & Crawford had approximately the same number of desktop PCs, but no data center, no back-office applications, and no network or infrastructure to speak of. With 35 satellite offices around the United States to support, Chris Mitchell—then the sole IT person and today Swett & Crawford's chief information officer (CIO)—had to prioritize and make the most of the time he had to get the company up on a solid IT footing.

At the time of the divestiture, employees were using the IBM Lotus Notes client software and the IBM Lotus Domino server software for their messaging and collaboration needs. The applications were functioning and the users were familiar with their conventions, so Mitchell recommended retaining these products—at least for as long as it took to attend to the new company's other more pressing IT needs.

So, Swett & Crawford began its new life using Lotus Notes and Domino. And because e-mail is one of the most prevalent forms of communication—internal or external—at Swett & Crawford, use of these tools was extensive from the start. Yet Mitchell soon discovered that there were downsides to relying on Lotus Notes and Domino. It was not easy to find and hire staff that knew the products. It was not easy to manage and archive user e-mail files. Mitchell soon hired an external firm to co-manage the Notes and Domino infrastructure, but that created its own complications. A combination of issues with the co-management arrangement, a growing population of users, and ever increasing mailbox sizes eventually resulted in an unmanageable environment

After two years of working this way—during which Swett & Crawford added, another 200 employees—enough was enough. E-mail was too critical for the organization. More than one million messages circulated through the Swett & Crawford network each month, the e-mail store was approaching four terabytes (TB) in size, and the Notes and Domino-based infrastructure was just proving to be too cumbersome to support. Mitchell pulled out the notes he had compiled on other messaging solutions before he decided to continue running Notes and Domino in-house, and two names immediately popped off the page: Microsoft Exchange Server and USA.NET, which offers an externally-hosted messaging and collaboration system based on Microsoft Exchange Server.

## Solution

“We had talked to USA.NET two years ago, when we first divested from our parent company,” says Mitchell. “There wasn't enough time to make a transition to hosted Microsoft Exchange then, but when it became a high priority for us to move off of Notes we went back and talked to them. The main thing we were looking for was an enterprise that could provide a Hosted Exchange solution that would support a large enterprise. Many companies can provide a Hosted Exchange service for small and midsize organizations, but we needed a provider with the experience and the services to support an organization with more than 1,000 users.”

Make that more than 1,000 distributed users, too. Swett & Crawford has personnel working in locations from Maine to Hawaii. Some work in offices; some work on the road. Some have desktop systems; some rely on Blackberry devices. All rely on e-mail. Mitchell and his team started making phone calls to determine whether USA.NET would be able to provide the support that Swett & Crawford required. USA.NET showed itself to be more than qualified to meet these needs.

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A wholly owned subsidiary of Perimeter eSecurity, this global secure eMessaging service provider is a Microsoft Gold-Certified Partner offering a range of hosted solutions, including messaging and collaboration services based on Microsoft Exchange Server and Microsoft Windows® SharePoint® Services. The Radicati Group cited USA.NET as the “top player” for the hosted business e-mail market, and it is the only hosting provider that is Statement on Auditing Standards (SAS) 70 Type II audited, a member of the Microsoft Technology Adoption Program for Exchange, and winner of the 2006 Microsoft Excellence Award for Exchange Hosting Solutions. The company’s eMessaging solutions are modular and infinitely scalable, designed to ensure that companies such as Swett & Crawford can grow without having to invest additional resources, time, or capital into a mission-critical messaging infrastructure.

“We really did not develop a formal set of requirements or send out any request for proposals,” Mitchell recalls. “We had already established the foundation of a relationship two years earlier, but we did a lot of phone interviews to confirm that our expectations were correct. Our sales people talked to their sales people. Our technical people talked to their technical people. We spoke to several of their reference accounts. At the end of the day, there was just no question in our minds that moving to hosted Microsoft Exchange at USA.NET was going to be a good fit for us—from a capabilities standpoint, from a cultural standpoint, and from a project management discipline standpoint.”

#### **Strong Partners Facilitate Migration**

USA.NET also brings strong relationships to the table, and that was critical to Swett & Crawford. Mitchell knew that Swett & Crawford would need help migrating its four TB of e-mail messages from Domino to Exchange. He also wanted to develop an

archiving plan that would ensure employee access to older messages without having to keep them in their Inboxes. USA.NET had relationships in place with firms that could help Mitchell in both these areas. Another Swett & Crawford service provider, SoftChoice, suggested InfraScience as solution provider for the conversion of Domino to Exchange. InfraScience had already performed many of these kinds of Domino-to-Exchange migrations. Additionally, Global Relay was poised to provide Swett & Crawford with a Web-based solution for accessing archived messages.

Working closely with USA.NET and its partners, Swett & Crawford prepared for the migration to Exchange. In a manner that was completely transparent to users, InfraScience migrated the e-mail messages from the Domino format to one compatible with Microsoft Exchange Server, and Global Relay archived all the messages older than 60 days. Then, on a Saturday morning in November 2007, Swett & Crawford shut down the Notes/Domino infrastructure. On Monday morning, all of Swett & Crawford’s users came in to find themselves using Hosted Exchange and the Microsoft Office Outlook® client (which had long resided on their systems as part of their Microsoft Office 2003 install).

Mitchell had considered running the Domino and Exchange infrastructures in parallel and slowly migrating users across but he ultimately decided that that was not a practical approach. “It just wasn’t worth the effort,” says Mitchell. “That’s a very complex approach and there are a lot of opportunities for messages to get lost. So we went back and forth. Do we take the big bang approach and move all the users over at once or do we go office by office, region by region, or time zone by time zone? At the end of the day, we were so well prepared to do the big bang approach that we decided that it was in the

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best interest of the company to do it that way.”

“Given the scale of this project and the potential impact to all of our staff, this was one of the smoothest technology transitions I’ve ever seen,” says Mitchell. “But we couldn’t have accomplished what we did without the diligent and professional efforts of the teams at USA.Net, Global Relay and InfraScience.”

#### **An Easy Transition for Users**

While the different conventions used by Notes and Outlook for interacting with e-mail might have made the transition complicated, Mitchell and his team took pains to prepare users for the transition well in advance of the actual cut-over.

“We made a lot of training available on our intranet,” says Mitchell. “We posted training materials and updates on a regular basis. Every week or so we updated the staff on the progress of the project and gave them updates on the timelines. It all went exceedingly well. The transition was well received, and I think a lot of that is due to the amount of communication we put out there. It’s one of those instances where you really can’t communicate too much information.”

#### **Benefits**

For Swett & Crawford, the benefits of moving to USA.NET and its Hosted Exchange solution are readily apparent. “E-mail is a critical tool for our organization,” says Mitchell, “and self-hosting a tool this important had become an issue. We needed to be sure that we had 24-by-7-by-365 access; we needed regular backups and rapid restore capabilities; we needed to make sure the storage area network [SAN] was running properly. To do all this ourselves, particularly when it was becoming harder and harder to find well-qualified Notes and Domino support personnel, was becoming too much of a distraction. E-mail is a com-

modity for us; we should not have to spend our time supporting it day in and day out.”

By outsourcing its e-mail infrastructure to USA.NET, Swett & Crawford has freed Mitchell and his team to work on other IT tasks that are critical to Swett & Crawford’s business and its customers. Moreover, USA.NET can provide that round-the-clock uptime and access that Swett & Crawford users need in ways that were simply impractical for Mitchell’s group—and they back up those uptime and access guarantees with a service level agreement.

“From an overall standpoint, the peace of mind that I have and that our organization has is a big benefit. With USA.NET we have a substantial, reputable, highly experienced service provider managing our mail infrastructure on a round-the-clock basis. It really gives us a lot of peace of mind.”

#### **Day-to-Day Benefits for Users**

For users, there are clear benefits to working with Microsoft Exchange, too. Shared calendars and contact lists make it easy for Swett & Crawford personnel to coordinate schedules and stay in touch with clients. They can now delegate rights and manage their own environments, too, which they could not do themselves before.

For Swett & Crawford’s Blackberry users there is an additional benefit that they have come to appreciate: Microsoft Exchange can wirelessly synchronize calendars and contact lists, which helps Swett & Crawford users stay up to date even when mobile.

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### **Supporting Business Expansion**

For Mitchell, the decision to move to USA.NET and Hosted Exchange was not a financial decision but a value-of-service decision.

Swett & Crawford personnel have access to a key messaging service that is more reliable and more easily accessible than its predecessor. That helps them to become more productive.

At the same time, the choice of Microsoft Exchange Server has opened up new service possibilities for Swett & Crawford. Mitchell's IT team, freed from the day-to-day responsibilities of managing the e-mail infrastructure itself, is working with USA.NET to integrate the company's voice-over Internet protocol (VoIP)-based telephony system with the USA.NET Exchange infrastructure. This would enable users to capture and store their voicemail in Exchange; it would also enable users to access their e-mail through the telephone system.

"These are things that USA.NET is helping us with," says Mitchell. "They're not services that USA.NET necessarily provides right now, but it's a real demonstration of how open-minded USA.NET is and how dedicated they are to adding value to our business."

"My hat is off to the entire staff of USA.NET," Mitchell goes on to say, "There's a consistency in the dedication, the professionalism, and the customer-centric focus they bring to an organization such as ours that's second to none."

## For More Information

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For more information about USA.NET products and services, call (800) 653-0179 or visit the Web site at: [www.usa.net](http://www.usa.net)

For more information about The Swett & Crawford Group products and services, call (404) 240-5200 or visit the Web site at: [www.swett.com](http://www.swett.com)

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### Partners

- USA.NET